CUSTOMER EXPERIENCE PLAYBOOK

A GUIDE TO TRANSFORM SERVICE DELIVERY
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Developed by the ACT-IAC Customer Experience Community of Interest,
in collaboration with government and industry leaders

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Customer Experience (CX) Playbook: A Guide to Transform Service Delivery

Introduction

Citizens deserve easy, useful access to government services. Yet, by all measures, the government's ability to effectively serve the public, and to meet expectations, is in decline. In Forrester's "The US Federal Customer Experience Index, 2016," the 15 federal agencies and programs rated, earned an average score of 58, well below private sector benchmarks. Improving citizen experience (CX) can't be done without technology, however, it's also as much about people and process. Improving the public's perception of the government service is complex, requiring changes in government culture, talent, governance structures, measures, and integrating feedback from the public. This Playbook provides guidance to improve services within your agency.

There are many benefits of improved Customer Experience - providing the public with better services in health, safety, financial, and benefits; reduce cost and risk; increased trust in government, citizen engagement and employee engagement; and increased voluntary compliance of government requirements such as paying taxes and completing the census.

What is customer experience (CX)? Why is it important in government?

While User Experience (UX) has been creeping into procurement and system design/development, CX is a newer concept for government. Customer experience is the overall perception that your customers have of your agency, organization, or service. CX begins when your customer has a need or problem and ends after the process is complete. Many understand customer service as satisfaction with a specific transaction using a specific channel (e.g., phone, website, walk-in office); however, CX includes the emotion you feel at the end of the journey when completing a transaction with government. Even if each touch point is a positive experience, the overall journey (too many steps, repetitive processes, inability for self-service) may lead to a negative CX. In contrast, UX is the experience users have interacting with a given system – does it meet their needs, is it usable and intuitive. UX is driven by user centered design –

2

putting the user at the center of all decisions, always starting with user research and understanding to inform feature prioritization, system flow, screen level designs and interactions. User Interface (UI) is the elements and behaviors of the screen – form fields, buttons, layout, visual design and branding, and feedback messages. Usability testing evaluates design decisions at all levels – whether the product or service meets users' needs, as well as where to click on a screen to accomplish a task. CX is influenced by potential the UX of many systems along a journey, as well as service and support and overall trust and value in the agency or process.

Providing improved services to the public has many benefits including:

1. **Efficiency** - when a customer gets their question answered or their service completed at the first touchpoint, it reduces repeat calls, visits, emails etc. To quantify, calls cost an average of $1 per minute to a contact center. By ensuring that the public can find their information on a website or other channels, millions of dollars can be saved.
2. **Reduced redundancy** – Agencies currently solve problems from a siloed point of view – typically not focusing on CX outside of a given system or touchpoint. A holistic approach across a journey can uncover redundant and unnecessary systems or features.
3. **Increased employee engagement** - when employees are able to serve customers and are valued within their agency for the service they provide, engagement is improved leading to increased discretionary effort and higher productivity.
4. **Increased trust in government** - when the government can't provide simple services or have disjointed answers to the same questions across different channels, the public loses trust and faith in the government and its overall operation.
5. **Increased compliance with government requirements** - as you complete your taxes or Census forms, if they can't be understood or are overly complicated, voluntary compliance goes down. Census data is used to make many important decisions across government; therefore, compliance is critical from a quality data prospective but also from a cost perspective.

Problem and Analysis

Across diverse sectors of the economy, a customer experience revolution is underway.

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Fundamentally new customer-centric methods are emerging that reframe how, when, where and by what means products and services are delivered to customers. Perhaps also as extraordinary is how quickly customers have changed their perceptions about what constitutes acceptable customer service.

U.S. federal leaders have not ignored this revolution. Federal agencies – like many other public and private organizations around the world – have taken steps toward becoming more customer-centric. In 2010, the federal government laid out its overall goal to improve the federal customer experience. Programs such as Federal Student Aid, the State Department's Bureau of Consular Affairs, Healthcare.gov and the Internal Revenue Service have made considerable strides. However, a major survey also found that two-thirds of the agencies stayed flat from 2015 to 2016. Key indicators show the federal government has failed to keep pace with citizens' expectations:

- The federal government ranks second-to-last out of more than 40 industries measured by the **American Customer Satisfaction Index (ACSI)**, ahead only of Internet service providers such as Comcast.[1] The government's 2015 ACSI score of 63.9 out of 100 is its lowest in nine years, dropping 4.5 points since 2012. ACSI is a well-established standard measurement for government service that evaluates the ease and timeliness of the process, clarify and accessibility of information, courtesy and professionalism of customer service and ease and usefulness of websites.[2]

- **Forrester's Customer Experience Index** for 2016 rates the federal government last of the 17 industries measured. The study shows that federal agencies ignore the key drivers of customer experience. Agencies ignore the role that emotion plays in CX, focusing instead on technology rather than employees, and what they believe the public wants or says they want, rather than what the data shows actually drives CX.[3] A 2015 Forrester study identified making customers feel valued, understanding their needs, resolving their problems quickly, and communicating in plain language as additional drivers.[4]

Moments of Truth

As citizens journey through life and interact with government at pivotal life events, there are substantial issues and challenges that inhibit government from delivering the seamless, high quality, secure and private services that the public expects.

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While previous Administrations have focused on customer service, the focus on customer experience has only begun. Customer experience encompasses the complete journey that the citizen takes from needing to solve a problem through a transaction and beyond. In many cases, these moments of truth require agencies to work together, share information or create a common vision for a service to solve a problem. Small improvements happen but there isn't enough re-imaging of service delivery that crosses government agencies and levels of government.

The Federal Government has a limited, disjointed and often parochial understanding of how the public wants to interact or receive services. Agencies work in stovepipes within their organizations as well as agencies working in silos across agencies. This limits the ability to leverage the limited data we have. There is also difficulty in collecting that information from the public due to the Paperwork Reduction Act (PRA). In addition, as identified by Forrester, agencies fail to have the skills needed to analyze data to determine good service delivery.

The Federal Leader's Reality

Federal leaders face challenges that complicate their ability to deliver an outstanding customer experience. They have broad mission mandates, uncertain budget environments, limited workers skilled in digital services, technology and the disciplines of agile development, and customer experience. The situation is further complicated by extreme scrutiny from Congress, the media, and various oversight bodies, and limited procurement options.

Customer experience efforts can be perceived as further burden on an already heavy mission and as a costly endeavor in tight budget times. Most executives within government do not understand CX and how it can save millions of dollars. Middle managers and frontline workers also perceive activities to improve services as a threat to the way they have always conducted business.

Senior leaders need to be aligned on customer values and be open to honestly assessing the service and experiences that are delivered. Regardless of how difficult it is, veterans, seniors, students, and citizens deserve to have services that meet or exceed the service provided in the private sector.

Where to start

CX is an iterative and continuous process. Understanding and choosing the right starting point for improving CX is a critical step in making an impact, building consensus and gaining momentum for Agency CX transformation. The following fundamental questions can assess Agency readiness.

- Is customer experience or customer service a priority within your agency?
- Is there an organization within your agency that is responsible for monitoring the service provided to your customers?
- Do senior leaders' performance plans align with CX as a priority?
- Does your agency have a culture of customer service?

If your agency's leadership and culture doesn't value customer service and customer experience, starting with small, bottom up efforts can be an alternative approach.

Customer Experience (CX) Framework and Plays

CX Framework

What's the value proposition and are you delivering?

Play 1: What experiences does your agency stand for?

Play 2: Determine the high value customer interactions or touchpoints.

Play 3: Align incentives with outcomes

What is really happening with your customer?

Play 4: Use data to understand customers

Play 5: Understand "who is your customer" and what do they need?

Play 6: Understand the experience from start to finish

Play 7: Develop a baseline for the current experience

Capacity for Change & Are you Getting Results

Play 8: Determine the appetite for change (incremental or overhaul)

Play 9: Gather your resources and understand funding and staff source

Play 10: Continually measure and monitor process and touchpoints

Customer Experience Plays

What's the value proposition and are you delivering?

Play 1: What experience does your agency stand for?

Most agencies have an experience that they aspire to deliver and values that they want to represent. These values could be providing a fair and equitable process when evaluating a request for a service or benefit; ability to protect the privacy and security of your personal information; transparency in data and process; ability for the public to know where their transaction is in the process; timeliness; etc.

- What does your agency stand for now and in the future? Transparency? Efficiency? Trustworthiness?
- Ensure senior leadership is committed to customer values
- Identify whether the culture is a customer-centric and whether it is represents Agency values

Play 2: Determine the high value customer interactions or touchpoints

Prioritize interactions across dimensions relevant to your agency. Importance can be weighted by Urgency/time to market, Impact to humans, consumer or business value, political sensitivity or risk and stakeholder complexity. There may be additional lenses – helpdesk support costs, press coverage – that drive priorities for your agency.
- Look from the Agency view – what it costs to serve customers (across channels and interactions)
- Assess high value to the customer -- how do customers derive value from the Agency
- How does Agency leadership and stakeholders (public, Congress, IG, others) measure mission success? (Number of citizens served? Number of calls answered? Citizen compliance with rules and regulations?)

Play 3: Align incentives with outcomes

Program offices are sometime
- Shared objectives and commitment, transparent across levels and function to evaluate on CX objectives and goals.
- Have alignment across senior leaders and ladder down to the working teams.
- Include in performance evaluations and procurement evaluation.

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What is REALLY happening with your customers?

Play 4: Use data to understand customer interactions

Develop an understanding of how customers are using your services across channels. Ask questions:

- How many customers are writing to you? How many customers are calling you? How often are they calling or writing or visiting?
- What is different about customers who are asking for these services in different channels?
- What questions are coming in to the helpdesk?

What does your Agency uses to measure customer service (e.g. American Customer Satisfaction Index (ACSI)? Plug in with your call center reps and listen to actual customer calls or spend time in a service center (if you have one) to see service first-hand. This should **not** replace data but gives you a feel for what your customers are really experiencing.

Play 5: Understand "who is your customer" and what do they need?

- "The American people" is not a customer group. Identify the different audiences and learn what they need and what they are trying to get from your agency. Segment your audience into groups based on their needs or behaviors.
- What do they need to consume or use from your Agency?
- Determine what matters most to customers
- Understand your customer's reality

Play 6: Understand the whole experience, from start to finish

To improve the overall CX, you need to understand the perception that the customer has at the end or completion of a transaction (e.g., when the service is delivered, when the answer is delivered, when the information is accessed etc). This transaction may have used many channels: website, virtual agent, email, or phone conversation with a customer service rep (CSR). When assessing the overall experience your citizens/customers are having with your program, service or agency, it's possible to have a good experience in one channel but, in the end have a bad perception of the overall experience based on a different aspect of the total journey.

The following questions help guide through the discovery process:

- Are users starting in one channel and ending in another?
- How are they coming to you – mail, walk-in, phone, web?

- Use personas, journey maps, ethnographic research, process maps, or other tools to understand the current experience of the most important journeys/tasks/interactions.
- Understand that the entire experience may include other agencies. Reach out to collaborate and try to improve the entire process

Play 7: Develop a baseline for the current experience

- What are the specific steps that customers take when doing business with you?
- Where does the process break down? Example: taxpayers want refund status but they don't call the refund status line but instead they call the general 1040 number and try to get help that way since they think they can get more information
- Continually measure and evaluate the experience, both current and as you improve
- Measure the customer experience across the entire journey and for each touchpoint

Capacity for Change & Are you Getting Results

Play 8: Determine the appetite for change (incremental or overhaul)

- Identify opportunities for improvement, even if outside 'your' system. Communicate opportunities to other stakeholders.
- Find both quick wins and long term vision
- Identify a pipeline of initiatives to improve the customer experience and build a backlog

Play 9: Gather your resources and understand funding and staff sources

- Start with funding, get your funding in order
- Collect benchmark data to show ROI
- Understand how you will staff efforts

Play 10: Continually measure and monitor process and touchpoints

- Regularly evaluate the touchpoints/process at whatever frequency is appropriate.
- Establish a process for monitoring progress in improving the customer experience
- Celebrate successes, however small. Recognize that this is never done.

[1] **American Customer Satisfaction Index,** *ACSI Federal Government Report 2015,* **January 26, 2015. Retrieved from** http://www.theacsi.org/news-and-resources/customer-satisfaction-reports/reports-2015/acsi-federal-government-report-2015

[2] http://www.theacsi.org/index.php?option=com_content&view=article&id=30&Itemid=847

[3] The US Federal Customer Experience Index, 2016, August 30, 2016

[4] **Forrester Research,** *The U.S. Federal Customer Experience Index, 2015,* **August 13, 2015. Retrieved from**
https://www.forrester.com/report/The+US+Federal+Customer+Experience+Index+2015/-/E-RES120202
[5] Government For The People, Partnership for Public Service, February 2016

[6] McKinsey & Company presentation, 2016

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Reference

GSA supported OMB on the CAP goal on customer experience and created a CX toolkit as part of that effort. It contains links to CX resources in the areas of Strategy, Governance, Culture, Customer Understanding, Design, Measurement and Digital Services. The toolkit includes links to background information on the history of CX and customer service in the federal government, federal guidelines, and examples of agency plans and strategies.

[CX Toolkit](#)

[Digital Services Playbook](#)

Play 1: Understand what people need
Play 2: Address the whole experience, from start to finish
Play 3: Make it simple and intuitive
Play 4: Build the service using agile and iterative practices
Play 5: Structure budgets and contracts for delivery
Play 6: Assign one leader and hold them accountable
Play 7: Bring in experienced teams
Play 8: Choose a modern technology stack
Play 9: Deploy in a flexible hosting environment
Play 10: Automate testing and deployments
Play 11: Manage security and privacy through reusable processes
Play 12: Use data to drive decisions
Play 13: Default to open

Source: playbook.cio.gov

The federal government's largest CX challenges

Ten key departments and agencies drive the government's CX challenge since these agencies facilitate the majority of public's interaction with the federal government across all service channels and deliver services related to the safety and protection of the homeland and travel, border security and immigration, revenue, and benefits for Veterans, seniors, students, children and the poor and disadvantaged. Examples include the:

- Social Security Administration (SSA) that provides assistance to more than 43 million visitors to field offices and issues more than 16 million new and replacement social security cards in 2014; Internal Revenue Service (IRS) that processes more than 147 million individual income tax returns and 2 million corporate returns;
- Department of Homeland Security's Transportation Security Administration screened more than 653 million passengers with more than 23 million page views to the TSA pre-check website; DHS' Customs and Border Protection processed 375 million pedestrians and passengers at 328 ports of entry;
- DHS' Citizenship and Immigration Service processed more than 7 million benefit requests, including applications for naturalization, lawful permanent residence, change of status and refugee and asylum protection;
- Department of Health and Human Services (HHS') Centers for Medicare and Medicaid Services (CMMS) serves 54 million enrolled in Medicare and 64.9 million people enrolled in Medicaid in 2014. Healthcare.gov received 1.3 billion page views and 25 million calls to the call centers for Medicare and the marketplace;
- Department of Education's Federal Student Aid provided $133.8 billion in aid to 12.9 million students in 2014 with 114 million visitors to FAFSA.gov and 43 million to StudentLoans.gov;
- Department of Veterans Affairs processed 1.3 million disability and pension claims processed, education benefits disbursed to more than 1 million students and care provided to more than 8.3 million veterans;
- Department of State issued more than 14 million passports and passport cards with more than 425 million page views to travel.state.gov and 4.5 million calls to the contact center; and
- Department of Interior managed 292 million visits to the national parks with 16.9 million visits to Recreation.gov and nearly 927,000 calls to the Recreation.gov call center.[5]

Based on Forrester's recently released CX index, the National Park Service, the State Department Bureau of Consular Affairs and the Postal Service were rated as the top three in customer experience. The remainder of the services scored 60 or below; however, they did not rate CBP or border crossing.

The newly formed Core Federal Services Council has begun addressing the top 15 or 20 citizen services; however, it is in the very early stages of tackling single agency issues. They haven't begun to address a moment of truth that might require agencies to work together. This significantly reduces the ability for the government to create integrated services, share best practices and user insights, and educate the government employees on the importance of the citizen experience to the government and the country. One example could be a visa for an immigrant which would require the US Citizenship and Immigration Service (USCIS), Department of State, and Customs and Border Protection (CBP) to work together and rethink the process. McKinsey & Company found that positive customer experience creates benefits including customer satisfaction, productivity, revenues, and employee engagement. Their research showed that an improved customer experience increases customer satisfaction by 20%, lowers cost to serve by 15 to 20%, increases revenue growth by 10 to 15% and improved employee engagement by 20 to 30%. Forrester found that improved CX improves the trust in government and optimism in the future of government.[6]

The Importance of Digital Services to Improving CX

The Digital Services Playbook released in xxx states that "The American people expect to interact with government digital channels such as websites, email, and mobile applications. By building digital services that meet their needs, we can make the delivery of our policy and programs more effective." In reality, the American public expects to have information and services delivered anytime, anywhere on any device. This highlights the issue of "what does matter to the American people when interacting with government."

Digital services should include the ability for the public to work with, have access to, or interact with the government across websites, social media, email, phone, etc. All of these channels should be integrated to give the public a seamless experience across these channels. Focusing on one channel at a time rather than the overall journey across all channels results in a haphazard, disjointed experience.

Since 70 to 80% of all government interactions begin with websites, it's critical that the government provide websites that are easy to use, that content is easily found by all

15

commercial search engines, that content is easily understood through the use of plain language, and that websites use the latest in design techniques. When the citizen is able to complete the transaction or find the information they are searching for on your website, it eliminates the repeat visits, calls, etc. In Canada through their Citizens First Program; however, they have found that a robust search capability and the ability to "click to chat" to a live person when trying to complete a digital services will increase the adoption of digital services.

Citizens expect the Federal Government to be ready to deliver and receive digital information[2] and services[3] anytime, anywhere and on any device.[4] Better government services can be achieved by providing by "right-sizing" services: Provide the right service through the right service channel to the right customer. A bias towards digital services can result in better overall customer experience across an agency's omni-channel delivery model.

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